
026-1010 Rev 7 06-OCT-2011

Site Manager Installation Guide





Retail Solutions
3240 Town Point Drive NW, Suite 100
Kennesaw, GA 30144, USA

Phone: **770-425-2724**
Fax: 770-425-9319

Table of Contents

1 SERVER REQUIREMENTS.....	1
1.1. INSTALLATION CONFIGURATIONS.....	1
1.1.1. <i>Multiple-Server Machine Configuration</i>	1
1.2. APPLICATION AND DATABASE SERVER SUPPORTED CONFIGURATION	2
1.2.1. <i>Multiple Server Configuration</i>	2
2 SUPPORTED SECURITY.....	3
3 ESTIMATED BANDWIDTH USAGE	3
4 BACKUP DATABASE AND WEB SERVER.....	3
5 INSTALLATION STEPS.....	4
5.1. PREREQUISITE INSTALLATION	6
5.2. DATABASE CONNECTION SETUP	7
5.3. WEB SERVER FILE LOCATION	9
5.4. DATABASE SETUP.....	10
5.4.1. <i>Create Database</i>	10
5.4.2. <i>Database Update</i>	10
5.5. PRODUCT REGISTRATION AND ACTIVATION	14
5.5.1. <i>Registration</i>	14
5.5.2. <i>Activation</i>	16
5.6. LAUNCHING SITE MANAGER	17
6 UPGRADING SITE MANAGER.....	18
7 UNINSTALLING SITE MANAGER.....	19
8 QUICK START SOFTWARE SETUP.....	20
8.1. OVERVIEW	20
8.2. LAUNCHING SITE MANAGER	20
8.3. LOGIN	20
8.4. LICENSING	20
8.4.1. <i>Maintenance Upgrades & Tech Support Licensing</i>	21
8.4.2. <i>Feature Licensing</i>	21
8.5. CREATE A DIRECTORY STRUCTURE.....	21
8.5.1. <i>Add A Directory</i>	21
8.5.2. <i>Add A Site</i>	21
8.5.3. <i>Add A Control System</i>	22
8.6. SET UP USERS (OPTIONAL)	22
APPENDIX A: JAVA INSTALLATION	A-1
APPENDIX B: APACHE TOMCAT INSTALLATION	B-1
APPENDIX C: SUPPORTED PRODUCT VERSIONS	C-1

1 Server Requirements

There are several things that can effect how well the Site Manager software will run in a given environment. Each of these is slightly different but can be considered a comparable load on the system.

1. Number of users: The number of users in general -- but especially the number of simultaneous users -- can put a taxing load on the web server to service requests both to controllers as well as reading data from the database.
2. Number of sites: The number of sites that the system can communicate with -- especially simultaneous connections.
3. Functions performed on sites: There is quite a different load on the system between an occasional log retrieval, backup, or graphical screen versus pulling every log out of each controller at a site daily.



NOTE: Refer to Appendix C: Supported Product Versions for supported product versions.

1.1. Installation Configurations

The configuration for installing the Site Manager software is multiple server configuration.

1.1.1. Multiple-Server Machine Configuration

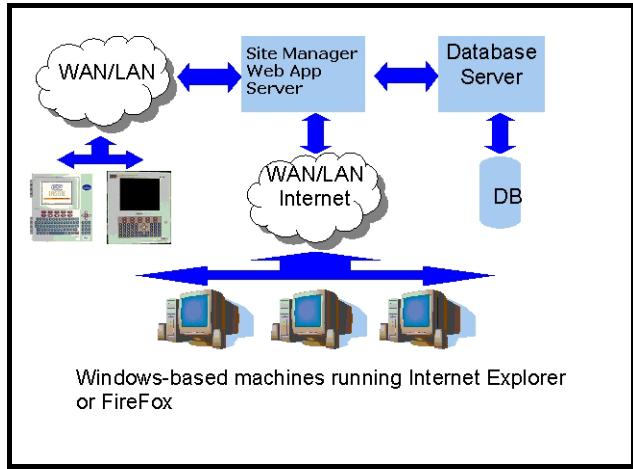


Figure 1-1 - Multiple-Server Machine Configuration

This installation configuration has the Site Manager Web application server and the database on two separate machines. This frees up the UI and protocol from having resources taken by the database server. This can be especially crucial during intensive operations (such as log retrieval, which has to update the UI, pull logs from controllers and place those logs in the database).

1.2. Application and Database Server Supported Configuration

1.2.1. Multiple Server Configuration

1.2.1.1. Application Server (Separate Machine):

- Minimum Specification:
 - Intel Xeon 1.8GHz with 4GB of memory
 - 40 GB drive with 20% free space
 - See Appendix C: Supported Product Versions for the supported versions of Microsoft Windows Server

1.2.1.2. Database Server (Separate Machine):

- Minimum Specification:
 - Intel Xeon 1.8GHz with 4GB of memory
 - Disk space size is variable depending on amount of data required
 - See Appendix C: Supported Product Versions for the supported versions of Microsoft Windows Server
 - See Appendix C: Supported Product Versions for the supported versions of Microsoft SQL Server



NOTE: Using E2 2.10F01 or higher with the Site Manager program is recommended for optimum performance.

2 Supported Security

The product supports the use of all security possibilities available to an Internet product such as SSL, firewalls, VPN, etc.

4 Backup Database and Web Server

For a complete recovery of information in the event of a failure of the Web server on which Site Manager is running, it is highly recommended that backups be performed on a daily basis in two separate areas:

- Backup of the database (using the standard procedure for your particular database)
- Backup of applicable Web server areas

For more information on backup procedure, see the *Administrator Activities* section of the Site Manager online help.

3 Estimated Bandwidth Usage

The bandwidth usage can be divided into two categories:

1. Bandwidth between the Web server and client browsers is dependent on the number of users logged into the system and how quickly they are changing pages.
2. Bandwidth between the Web server and the controllers that are on the corporate WAN is dependent on the activity being performed and the number of sockets that is open. The number of sockets open can be configured in the application server.

5 Installation Steps

If upgrading from a previous version of Site Manager, you must first uninstall the program. Skip to the Upgrade section of this install guide (**Section 6, Upgrading Site Manager**).

1. Insert the Site Manager Installation CD into the CD ROM drive to begin installation setup.
- a. If the setup does not automatically start, go to **Start > Run** and type “x:\setup.exe” where x is your installation source location.

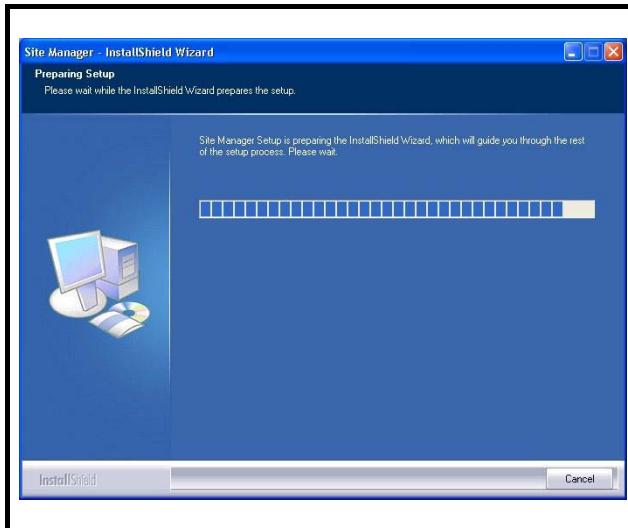


Figure 5-1 - Preparing Setup

A confirmation window will appear asking if a database server is installed and accessible:

- b. Click **Yes** if you have one installed, **No** if you do not have a database installed. Clicking **No** will stop the setup and exit the program. A database must then be installed, accessible, and a database user-created with correct privileges to connect to the database.

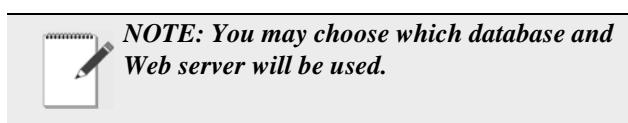


Figure 5-2 - Is A Database Installed?

2. When **Yes** is clicked, the *Site Manager InstallShield Wizard* window opens:

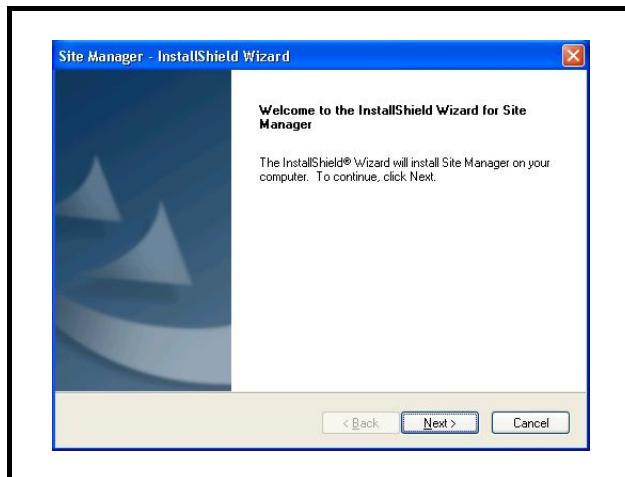


Figure 5-3 - Install Welcome

Click **Next** to continue.

3. The *License Agreement* window will open:

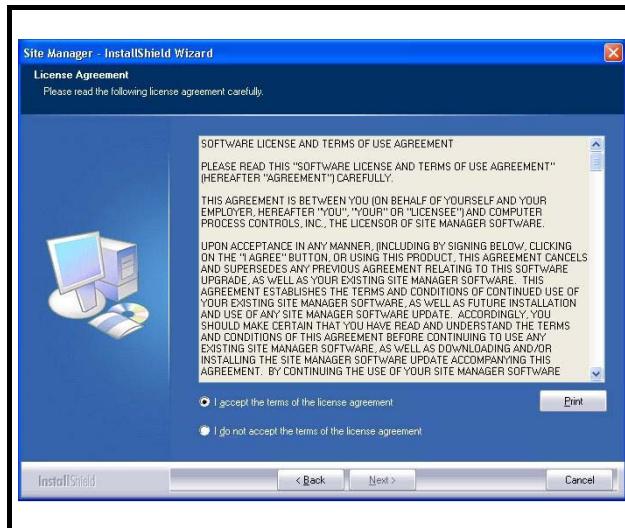


Figure 5-4 - License Agreement

- a. Read the “Terms of Use Agreement” and select **I accept the terms of the license agreement** if you wish to continue.
- b. Click **Next** to continue.

4. The *Customer Information* window will open:

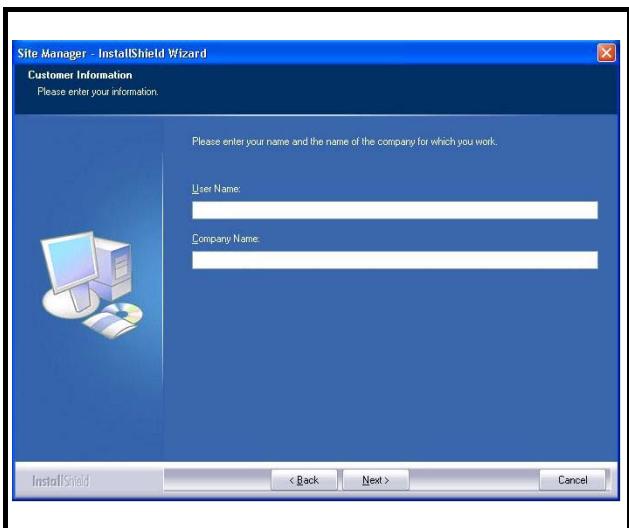


Figure 5-5 - Enter Customer Information

- a. Enter your name and company name into the respective fields and click **Next** to continue the install.
5. If you are running previous versions of Web servers or Java Runtime, the *Previous Version Removal* window will open with a list of the older products that must be updated before you can proceed with the installation:

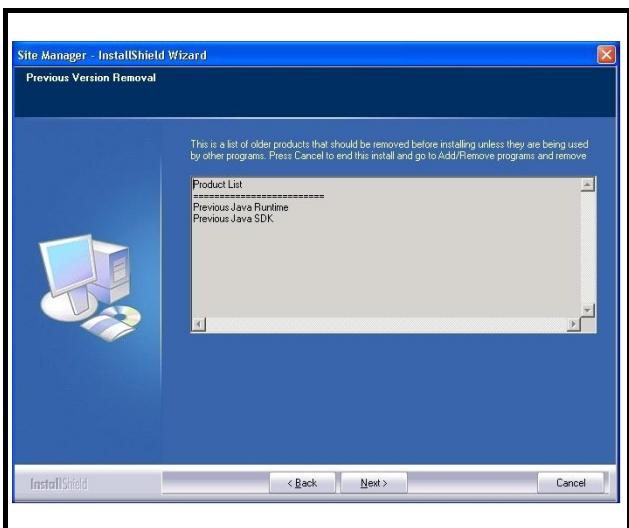


Figure 5-6 - Remove Any Old Versions of Web Servers

If no software upgrades are needed, proceed with the installation to **Step 6**:

6. The Web Server Information window will open:

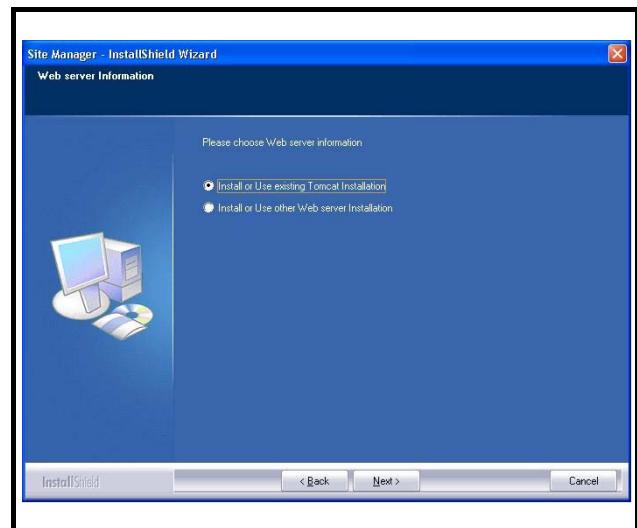


Figure 5-7 - Select Tomcat or Another Web Server

NOTE: Regardless of the type of server being used, it is suggested that a generic, non-version specific location for the install be chosen.

- a. Select whether to use Tomcat or another Web Server installation: (For supported product versions, see **Appendix C: Supported Product Versions**.)

Install or Use existing Tomcat Web Server Installation: Use an existing Tomcat Installation or install Tomcat, select **Install or Use existing Tomcat Web Server Installation**. Click **Next** to continue and go directly to the Prerequisite Installation Review window (**Step 10, Section 5.1, Prerequisite Installation**). Go to **Appendix B: Apache Tomcat Installation** for Tomcat installation instructions.

Install or Use other Web Server Installation: If you wish to install, or already have installed another Web server besides Tomcat, select **Install or Use other Web Server Installation** and click **Next** to continue (**Step 7**). Go to **Appendix A: Java Installation** for Java Installation instructions.

7. A confirmation window will open and ask if you have a Web server installed:



Figure 5-8 - Web Server Installed?

- a. If you already have a Web server installed, click **Yes**.

8. Because Tomcat is not being used as the Web server, select the Web server location:

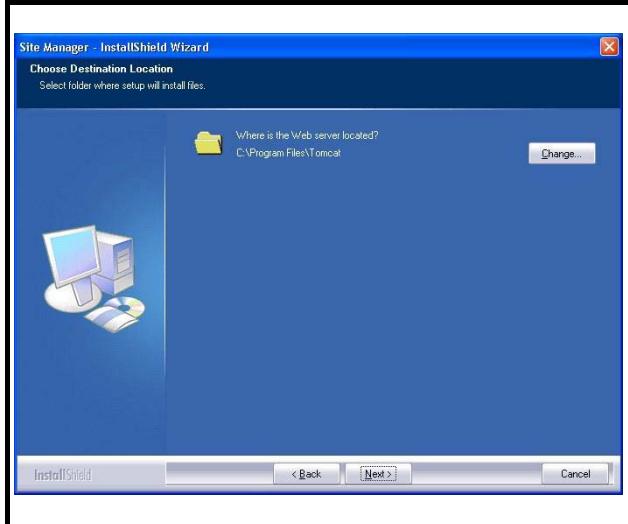


Figure 5-9 - Web Server Location

- a. Select **Change** to choose a custom location for the Web server application location.
- b. Click **Next** to continue.
9. If you choose **No** on the *Do you have a Web server already installed?* message window, (*Step 7*) you are presented with a confirmation window that will ask if you wish to install Tomcat on your machine as the Web server:

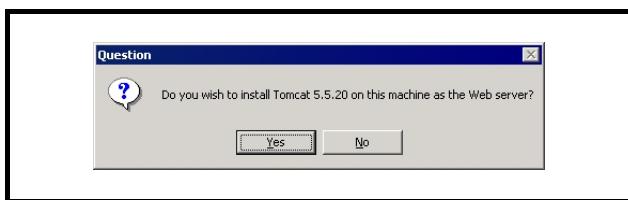


Figure 5-10 - Install Tomcat as Web Server?

- a. If you wish to install the Tomcat supported version as your Web server, click **Yes**. The Prerequisite Installation Review window opens, (*Step 10*) listing the prerequisites that need to be installed before the Site Manager installation can proceed.
- b. If you do not wish to use the Tomcat supported version as the Web server, click **No**. A message window opens informing you that a Web server must be installed to continue or to select **Install or Use existing Tomcat Web Server Installation**

on the Web Server Information window (*Step 6*).



Figure 5-11 - Use Tomcat or Install Web Server

- c. Click **OK** to continue and the install is terminated. You will need to install a Web server to continue with the install.

For instructions on Web server installations, go to **Appendix A: Java Installation** for Java installation instructions and **Appendix B: Apache Tomcat Installation** for Tomcat installation instructions.

5.1. Prerequisite Installation

10. If you are not running the supported version of Tomcat and Java Runtime, the *Prerequisite Installation Review* window opens, listing the prerequisites that need to be installed before the Site Manager installation can proceed. (If no prerequisites need to be installed, go directly to *Step 11*).

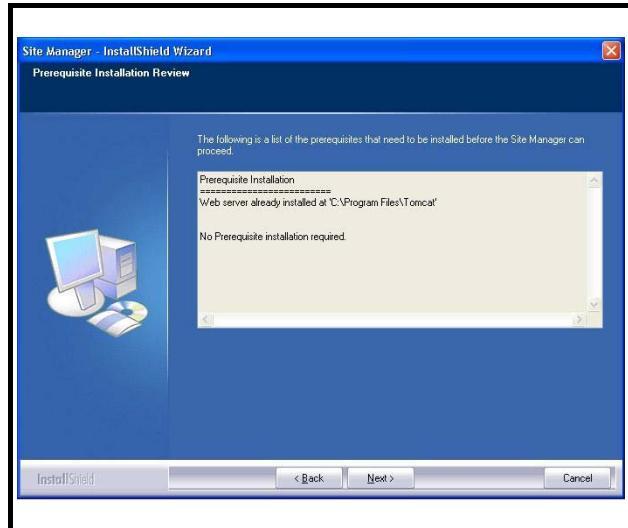


Figure 5-12 - Prerequisite List

- a. Click **Next** to install the prerequisites and continue with the install.

5.2. Database Connection Setup

11. The *Database Connection Setup* window will open after all the prerequisites have been installed.

Choose which database Site Manager will be connecting to:

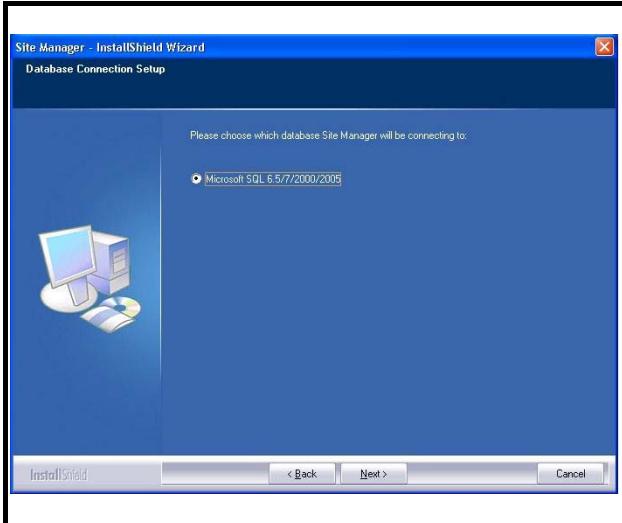


Figure 5-13 - Choose Database

- If **Microsoft SQL is chosen**, enter the domain for Windows authentication (*Step 12*).



NOTE: If you are using Microsoft SQL Server 2000, you must be running at least Microsoft SQL Server SP 3.

If using Windows XP SP2 and Microsoft SQL Server 2000, you must be running at least Microsoft SQL Server, SP 4.

12. The Windows authentication window:

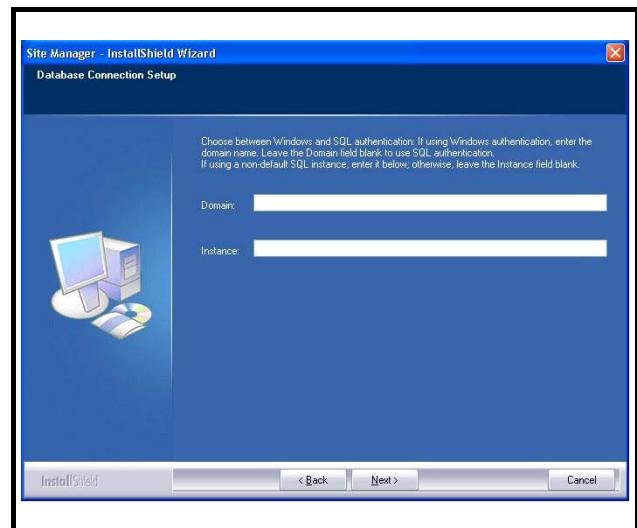


Figure 5-14 - Windows Authentication for Microsoft SQL

For the **Domain** field, choose to use *either* Windows Authentication *or* SQL authentication for *both* users (database administrator and Site Manager end user). The same authentication type must be used for both users. For Windows authentication, enter the domain name. For SQL Authentication, leave the **Domain** field blank.

For the **Instance** field, if using an SQL instance that is not the default, enter it into the field. Otherwise, leave the **Instance** field blank.

13. The *Database Connection Setup* window opens:

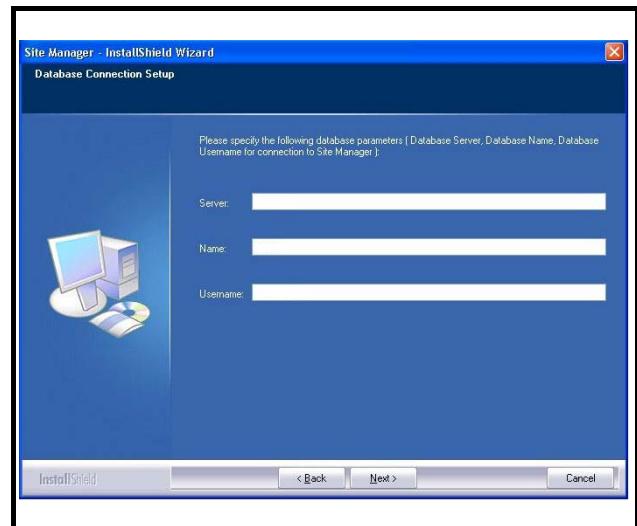


Figure 5-15 - Database Connection Setup

The information in these fields will be used to connect the database with Site Manager.



NOTE: These parameters must be exact. If the information in these fields is entered incorrectly, you must contact Retail Solutions for assistance.

- a. Enter the database server, database name, and username into their respective fields:
- **Server:** Enter the name of the server that has the database installed.
- **Name:** Enter the name of the database that Site Manager will use to store its data.
- **Username:** Enter who will be the connection user. This is for the connection of the server running the product, not for populating the database.

After entering your information, click **Next** to go to **Step 15**. (Only proceed to **Step 14** if using a database other than Microsoft SQL.)

14. If you have chosen a database other than Microsoft SQL, (**Step 11**) highlight all the database .jar files from the location on your PC and click **Open**. The database files will be copied into the correct location during the installation.

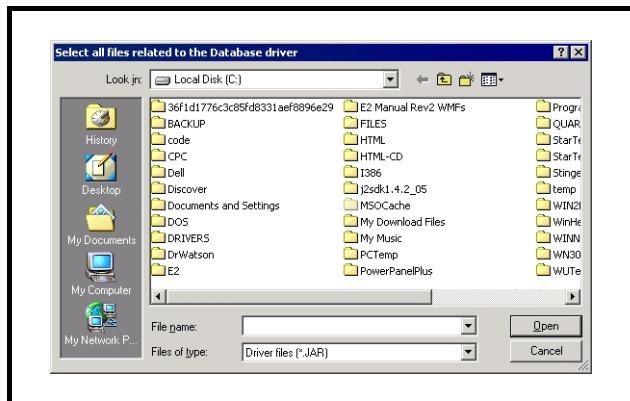


Figure 5-16 - Highlight Database Files and Click Open

15. Click **Next** to enter your password and open the **Web Server File Location** window:

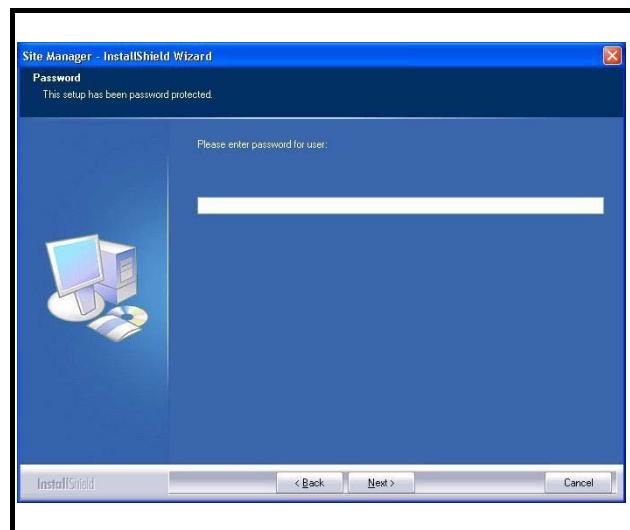


Figure 5-17 - Enter Password for Database User

- a. Enter the password for the database user and click **Next** to continue.

16. The **Database Command Setup** window opens:

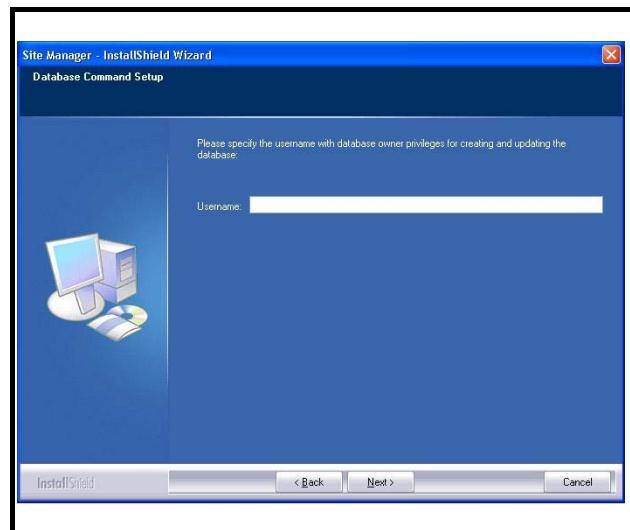
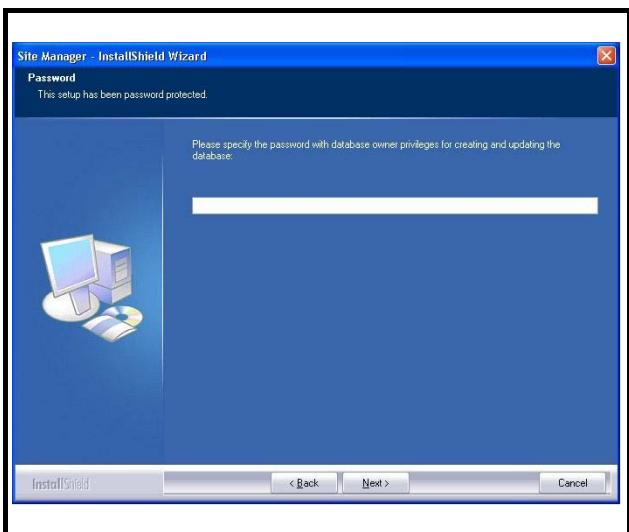


Figure 5-18 - Username with Database Owner Privileges



NOTE: This user must have proper privileges to drop, create, and populate tables in the database.

17. After the username has been entered, the *Password* window opens:



NOTE: This location must be correct in order for the application to function. If your Tomcat location has changed because of an upgrade during this install, you must change the location to match this new Tomcat location (the "webapps" subfolder). For Web servers other than Tomcat, please see Web server documentation for correct location details.

b. Click **Next** to continue with the install and create a database or update an existing one.

Figure 5-19 - Password with Database Owner Privileges

a. Enter the password for the database user and click **Next**.

5.3. Web Server File Location

18. Choose the location the install will deploy from in the *Web Server File Location* window:

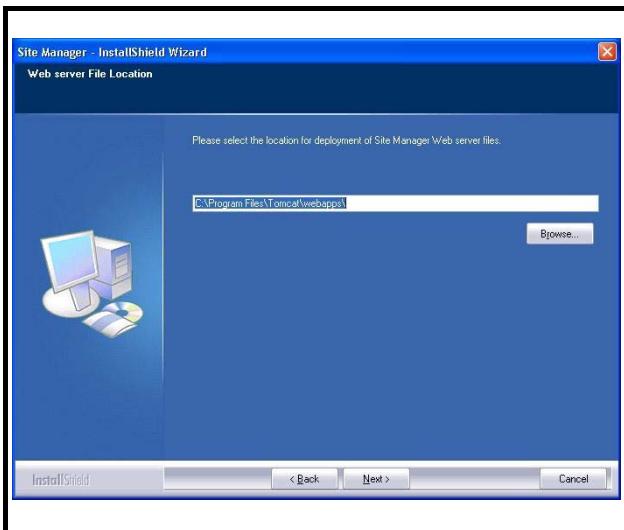


Figure 5-20 - Location for Web Server Files

a. Use the default location for deployment of the Site Manager Web server files, or click **Browse** to choose your own location.

5.4. Database Setup

5.4.1. Create Database

19. The *Database Create/Update* window opens:

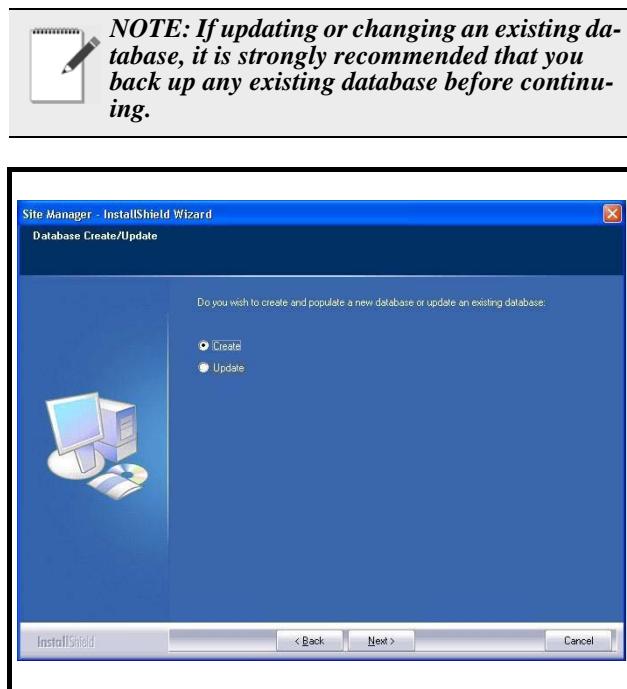


Figure 5-21 - Create or Update Database

- If **Create** is chosen on this window, a database will be created and populated with basic data only, if a database already exists, the *Database Create Procedure* window will appear when **Next** is clicked.
- If **Update** is chosen on this window, an existing database will be updated to work correctly with the latest version of Site Manager.

20. *Database Create Procedure* window:

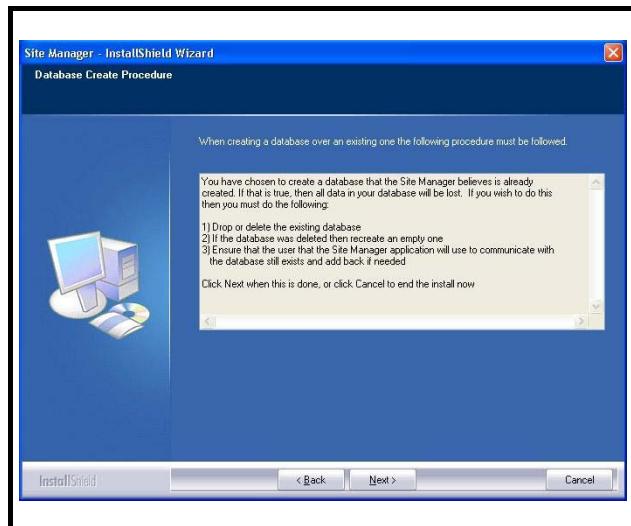
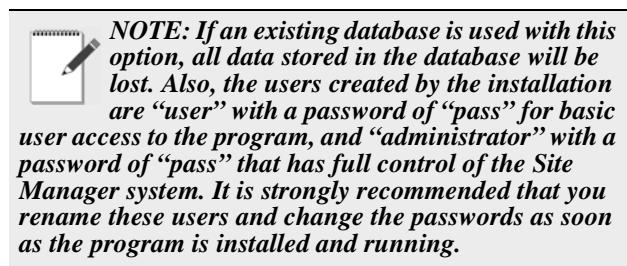


Figure 5-22 - Database Create Procedure

- Click **Next** when the database has been created, or click **Cancel** to quit the install and start over.

5.4.2. Database Update

The Database Create Procedure window (**Figure 5-22**) will open if you choose **Update** or if you have chosen **Create** but already have a database installed.

- Click **Yes** to exit the install and back up the database, or pause on this screen, where you can back up the database and then click **No** to continue with the install. If you do not wish to back up the database, click **No** to continue with the install.

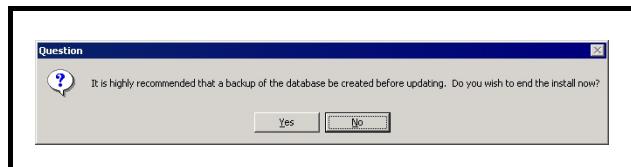


Figure 5-23 - Back Up Database?

22. The *Choose Destination Location* window will open where you may choose where the database scripts will be stored:

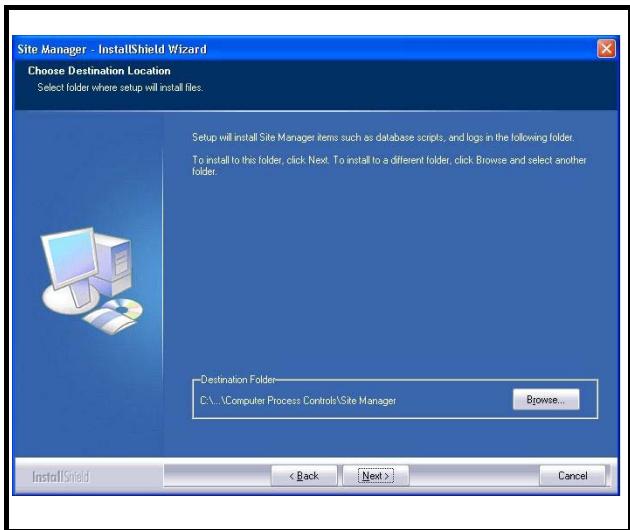


Figure 5-24 - Location for Database Scripts

- Click **Next** to accept the default location or **Change** to specify another location.

23. For Advisory Receiving Setup, enter the server name or IP Address of where the advisories will be sent and the open ports for **E1 Port** and **E2 Port** fields:

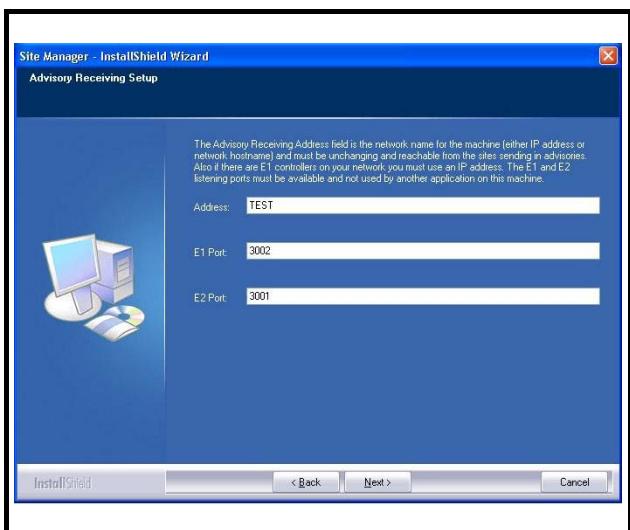


Figure 5-25 - Advisory Receiving Setup

These fields may be pre-populated with defaults; however, verify the IP address or server name entered in the **Address** field is static and visible from the controllers at the site. This address should also belong to the machine on which the installation is located. The ports entered must be available and unused by any other application on this machine. Consult your network administrator for further in-

formation. Click **Next** to continue.

Email Setup

- To send out advisories by email, enter the name of the machine that will be hosting SMTP in the **SMTP** field in the *Email Setup* window and click **Next**. (Change the **Port** if necessary and enter the **Username** if the SMTP server needs a login in order to send emails.) If you do not want to set up email sending, leave this field blank and click **Next** to skip to **Step 25**.

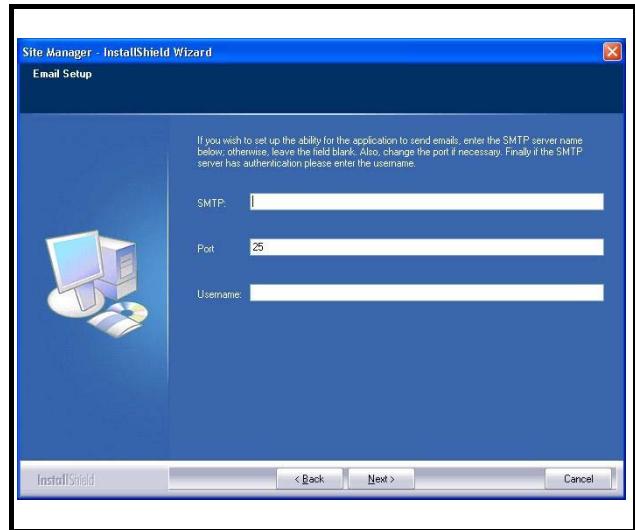


Figure 5-26 - Set Up Email Sending Ability

- If a username is entered, enter the password in the window that appears below:

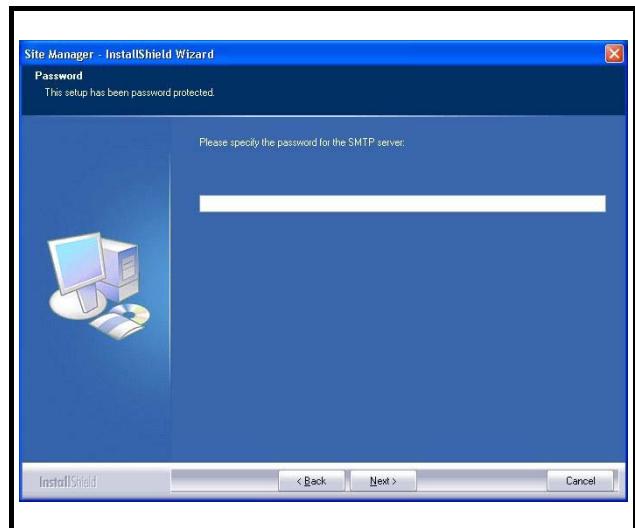


Figure 5-27 - Enter Password

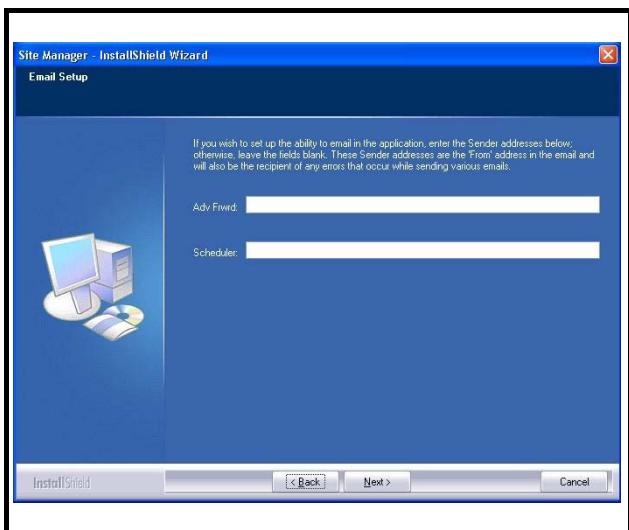


Figure 5-28 - Email Setup

To complete email setup, enter the sender email addresses in the fields; otherwise, leave blank. The **Scheduler** email address will be the sender of the scheduled activity results.

Click the **Next** button to continue.

26. Review the installation information in the *Installation Review* window:

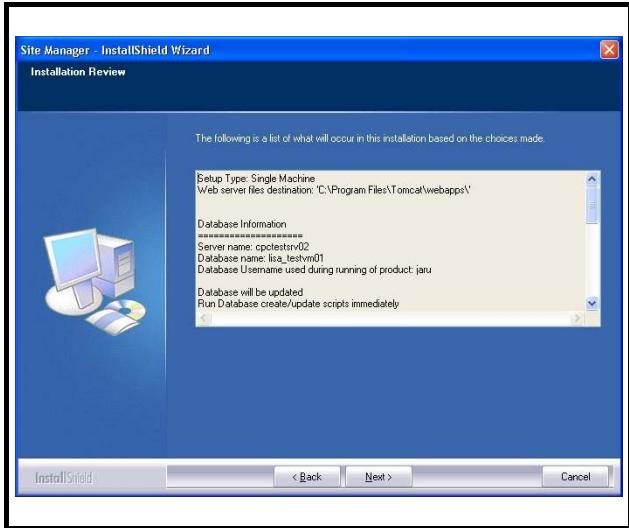


Figure 5-29 - Installation Review

a. Click **Next** to continue.

27. If the Web server is up and running, you will be asked to shut it down:



Figure 5-30 - Shut Down Web Server If Running



NOTE: The Web server must be shut down and ALL PEOPLE MUST BE OUT OF THE DATABASE before the installation can be continued.

- After shutting down the Web server, click **OK**.
- The *Ready to Install the Program* window will open to indicate the installation is ready to begin.
 - Click **Install** to begin the installation of Site Manager, **Back** to go back to the previous window, or **Cancel** to exit the install.

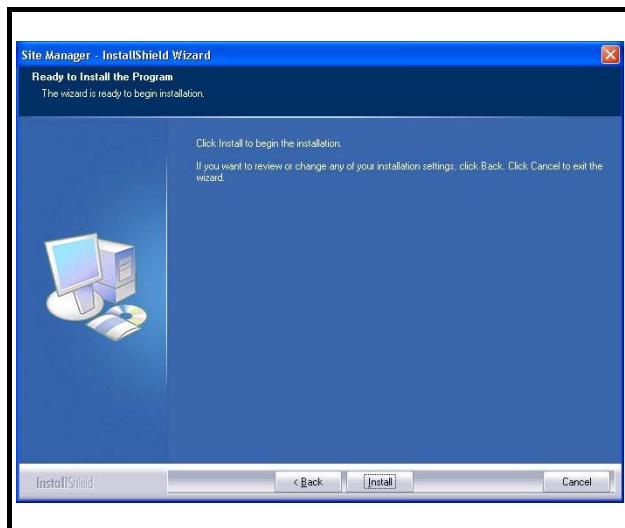


Figure 5-31 - Begin Installation

29. The *Setup Status* progress window will display, detailing the status of the setup/installation:

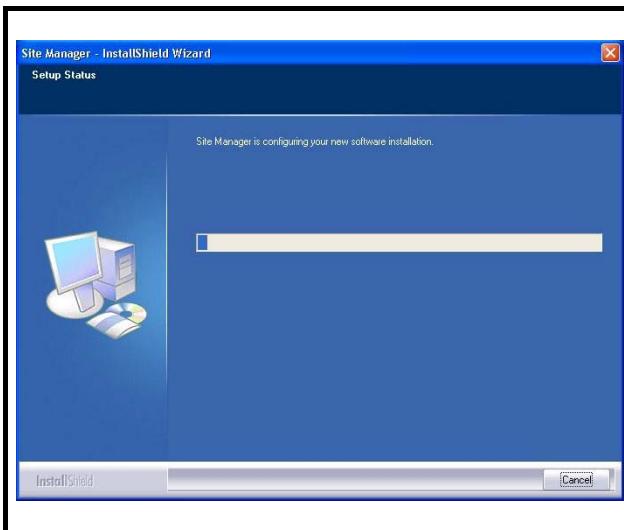


Figure 5-32 - Install Status

30. If **Create** was chosen in the *Database Create/Update* window (*Step 19*), you will see this type of update status while the database scripts are running:

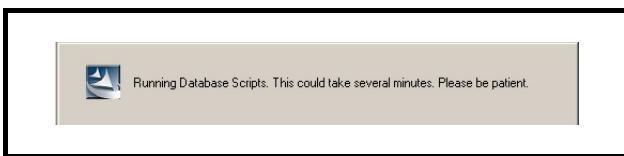


Figure 5-33 - Database Scripts Status

If **Update** was chosen in the *Database Create/Update* window (*Step 19*), you will see this type of update status while the database scripts are running:

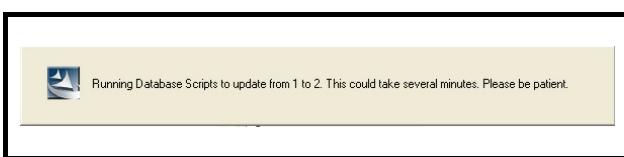


Figure 5-34 - Database Scripts Status

Web Server Settings

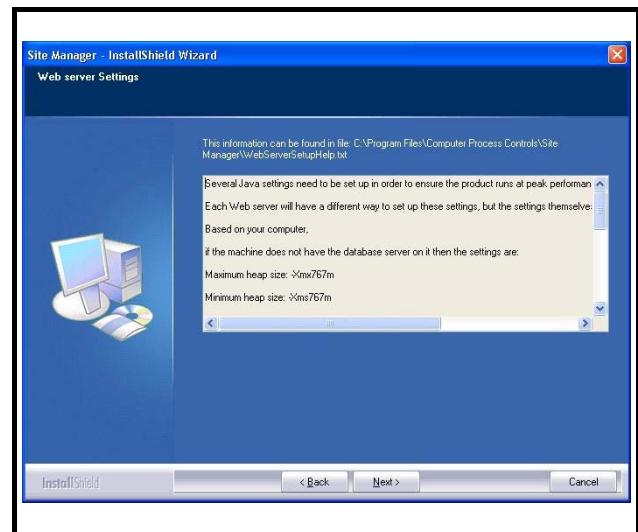


Figure 5-35 - Web Server Settings

These values are created automatically and are calculated for you based on the amount of memory. These values should not need to be changed. If you have any questions, contact Retail Solutions for assistance at 770-425-2724.

The **max JVM heap size** (Java command line setting **-Xmx**) and the **min JVM heap size** (Java command line setting **-Xms**) should be set to the same value. **-Xmn** is a Java “garbage” collection setting.

31. Once the settings are correct, click **Next** to complete the installation.

32. The InstallShield Wizard Complete window opens:

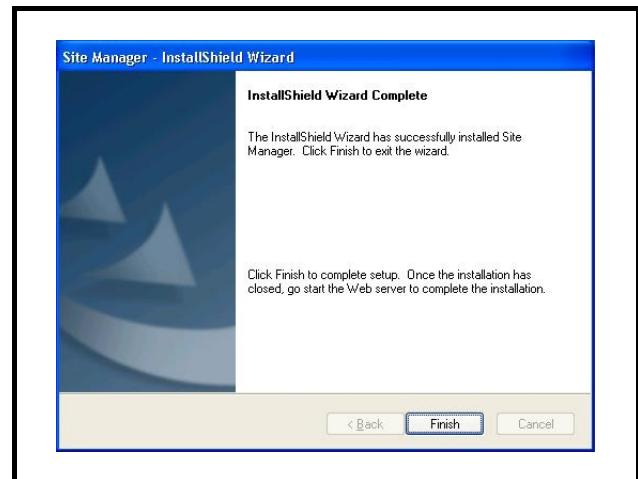


Figure 5-36 - Install Complete

Click **Finish** to complete the installation of the program.



33. If the InstallShield Wizard Complete window asks if you would like to restart your computer, select to restart now (Yes) or later (No) and click **Finish**.

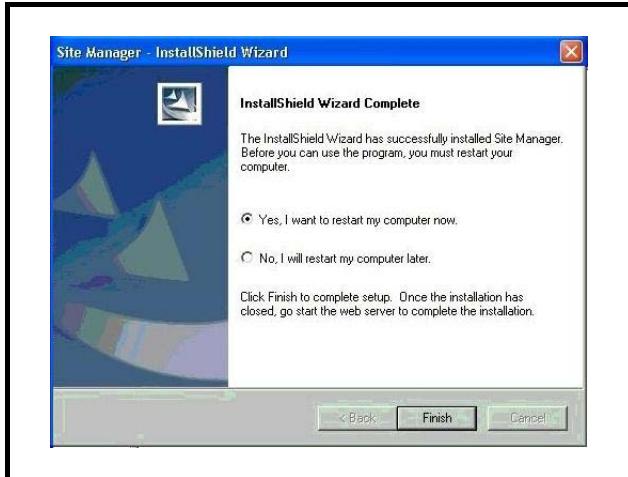


Figure 5-37 - Restart Computer Now or Later

2. Click the **Registration** button to proceed in obtaining a license.

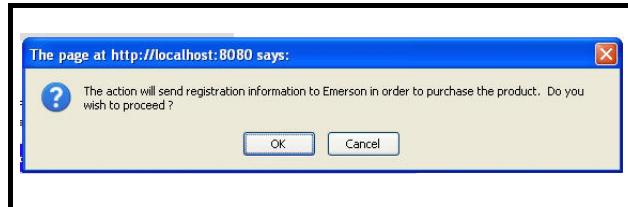


Figure 5-39 - Click OK to Proceed

3. Click **OK** to open the *Product Activation License Registration* window. The state of the current license is displayed on this page:



Figure 5-40 - Click Register to Begin Entering Information

5.5. Product Registration and Activation

5.5.1. Registration

To register the software for a Trial License (90 days), go to the *Feature Licensing* page of the software.

1. Click the **Help** drop-down list and click **Feature Activation**. The *Feature Licensing* page will open:

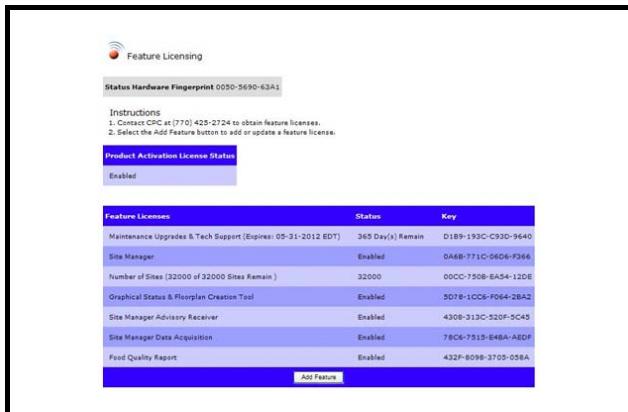


Figure 5-38 - Feature Licensing Page

4. To begin entering your information, click the **Register** button and the window will open where you will enter your information:

Figure 5-41 - Fill Out All Fields and Click Submit Registration

5. Fill out all fields on this window including: **Sales Order #** (call Customer Service at 770-425-2724 to obtain your sales order number), **Company Name**, **Address**, **Name**, **Email**, **Confirm Email**, and a contact **Phone Number**. If desired, enter any extra information into the **Additional Information** box (optional). *Note that for non-SMTP enabled systems, you must specify if the Web application is a virtual machine by selecting Yes or No for Virtual Server.* Verify that the information you entered is correct and click the **Submit Registration** button.

For systems that are SMTP-enabled, your information will be sent automatically to Emerson Retail Solutions. Proceed to **Step 6** to finish.

If successful, a confirmation window will open to notify you that your registration information has been sent:

Figure 5-42 - Click OK

6. Click **OK** and you will return to the Feature Licensing page (**Figure 5-38**).

7. **For systems that are not SMTP-enabled**, (for more information, refer to **Step 24** of this document) after filling out your information (**Figure 5-41**), follow the instructions in the *Product Activation and Licensing* window:

Figure 5-43 - Follow Steps 1-5 on this Window

Step 1 - Create an email and include all the information listed in this step.

Step 2 - Enter **SolutionsLicensing@emerson.com** in

your email's **To:** field.

Step 3 - In the **Subject:** field of your email, enter **Site Manager Product Activation License SO#** (followed by the Sales Order number obtained from customer service).

Step 4 - Open your browser window and locate the directory that contains the .zip file (verify that it is the most current version if there are more than one).

Step 5 - Send the email to
SolutionsLicensing@emerson.com

Click **OK**.

This will return you to the *Feature Licensing* page (*Figure 5-38*).

5.5.2. Activation

1. Once you receive the email containing the file for purchasing the software, save the file to a location on your drive.
2. On the Feature Licensing page (*Figure 5-38*), click **Activation**:



Figure 5-44 - Activate License - Feature Licensing Page

3. Click **OK** on the confirmation window to proceed:

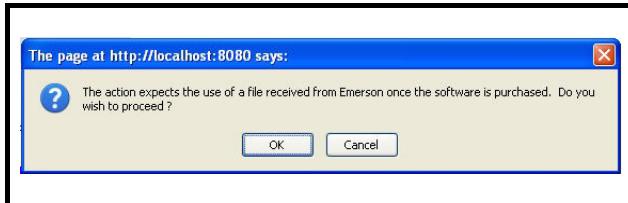


Figure 5-45 - Click OK

4. The *Product Activation License Import* window will open and show the current state of licensing:



Figure 5-46 - Click Browse

5. Click **Browse** and the *File Upload* window will open:

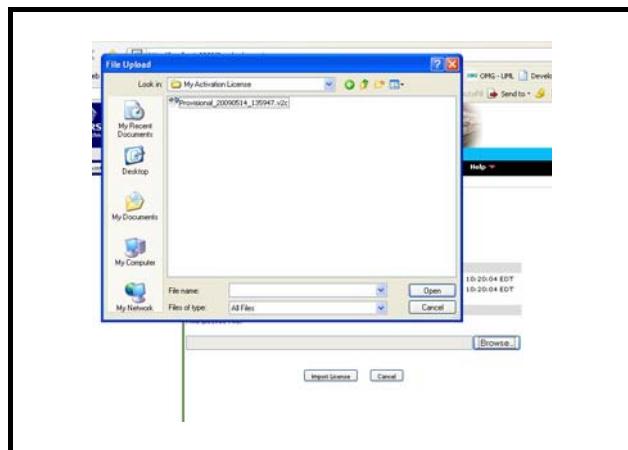


Figure 5-47 - Locate File in the File Upload Window

6. Highlight the file and click **Open**.
7. When the file appears in the **Browse** path, click the **Import License** button:



Figure 5-48 - Click Import License

8. The *Product Activation License Update* window will open:



Figure 5-49 - Click **Apply Imported License**

9. Once the **Apply Imported License** button is clicked, the selected license file will be applied (or click **Cancel** to stop and exit).

5.6. Launching Site Manager

1. To launch the Site Manager program:
 - a. Open a Web browser. If running the same computer on which Site Manager was installed, type **http://localhost/emerson** inside the browser field. If running the program from another computer, use the machine name or IP address instead of **localhost**. The Site Manager program will open.
 - b. You may now log into the program. Users created by the installation are “user” with a password of “pass” for basic user access to the program, and “administrator” with a password of “pass” that has full control of the Site Manager system. It is strongly recommended that you rename these users and change the passwords as soon as the program is installed and running so that duplicate login names and passwords do not occur. For more information, refer to the User Manager and Group Manager online help.



NOTE: If you wish to import site information from UltraSite or Site Manager Terminal Mode, go to the Administrative Activities section of the Site Manager online help and follow the instructions for importing an XML datafile.

6 Upgrading Site Manager



NOTE: When upgrading Site Manager, refer to Technical Bulletin P/N 026-4307 for complete instructions on how to upgrade Tomcat.

1. To upgrade Site Manager to a newer version, run the CD or the setup.exe, and the *Upgrade or Remove Program* window opens to indicate that the program has been detected.

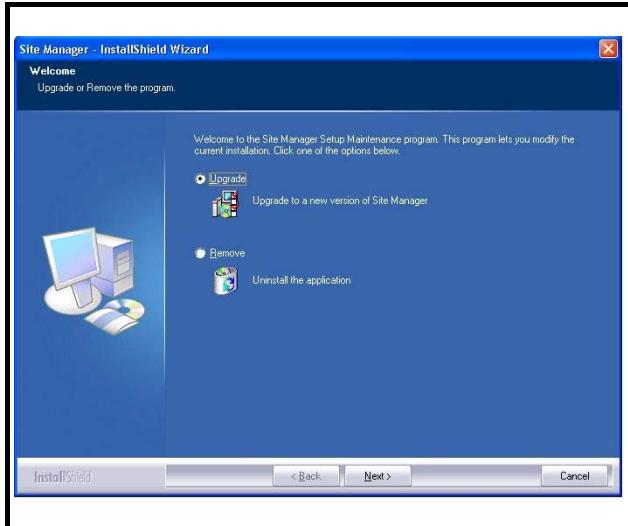


Figure 6-1 - Upgrade Site Manager

2. Select **Upgrade** and click **Next**.

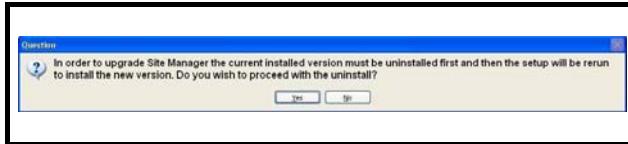


Figure 6-2 - Uninstall Current Version of Site Manager to Upgrade

3. Click **Yes** to continue with the uninstall, **No** to go back to the previous screen.
4. An *Upgrade Reminders* window will open with varying reminders depending on what version of the software you are upgrading to. Note these reminders as they may impact installation after the upgrade is complete.

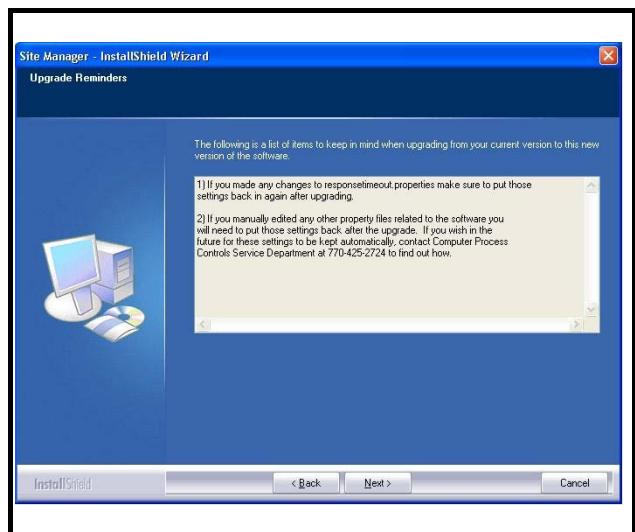


Figure 6-3 - Make a Note of Upgrade Reminders

You must first uninstall the current installed version, and then repeat the setup steps of this guide (**Section 5, Installation Steps**) to install the new version.

5. Click **Next** to uninstall the current version and repeat the installation steps.

7 Uninstalling Site Manager

- To uninstall Site Manager, go to **Add/Remove Programs** in the Windows Control Panel, choose **Site Manager**, and the *Upgrade or Remove Program* window opens indicating that the program has been detected.

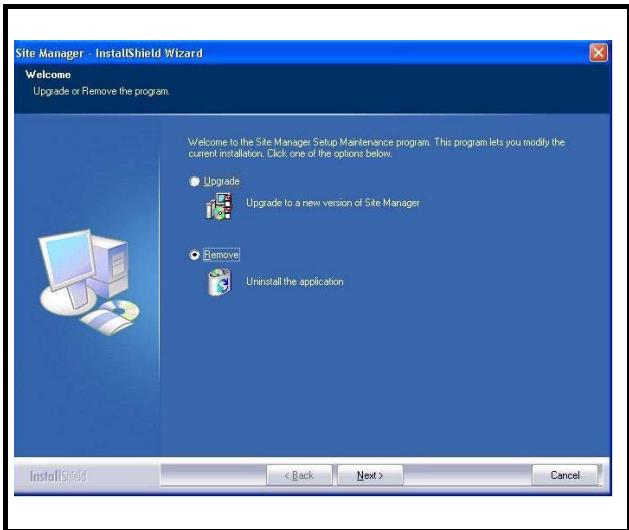


Figure 7-1 - Select Remove to Uninstall

- Select **Remove** and click **Next** to begin an uninstallation of the program. A confirmation window will open asking if you want to remove the selected application and all of its features.



Figure 7-2 - Remove Application?

- Click **Yes** and a confirmation window opens. The Web server must be shut down before continuing with the uninstall. (**Start > Control Panel > Administrative Tools > Services > Your Web Server > Right-click and select Stop**)
- Click **Yes** (*Figure 7-3*) after the Web server has been shut down to continue with the uninstall, or click **No** to stop the uninstall. (This will only occur

if the install identifies that the Web server is up and running; otherwise the window does not appear.)

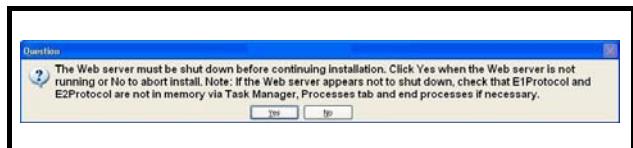


Figure 7-3 - Click Yes to Continue

- The *Maintenance Complete* window will open. Click **Finish** to complete and exit the uninstall.

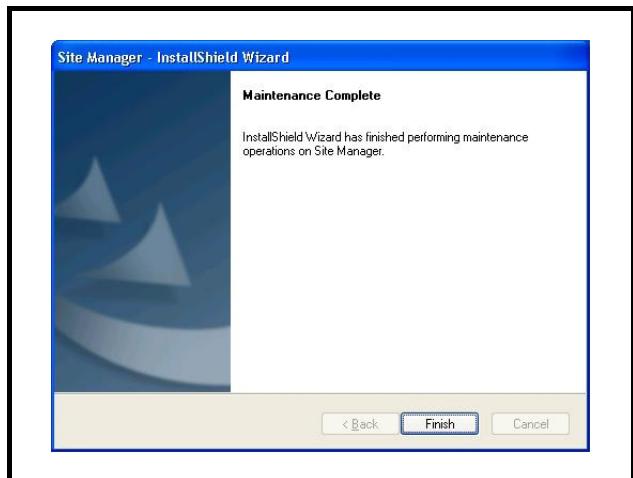


Figure 7-4 - Maintenance Complete

8 Quick Start Software Setup

8.1. Overview

This section gives step-by-step instructions to show you how to log in to Site Manager, set up the navigation tree, user access, and communication information. From the navigation tree you can connect to controllers, set up directory, site, control system, and unit information.

8.2. Launching Site Manager

To begin using Site Manager, open a Web browser:

If running the same computer on which Site Manager was installed, type **http://localhost/emerson** inside the browser field. If running the program from another computer, use the machine name or IP address instead of **localhost**. The Site Manager program will open.

You can begin using Site Manager by creating a directory structure **Section 8.5., Create A Directory Structure** or setting up users **Section 8.6., Set Up Users (Optional)**.

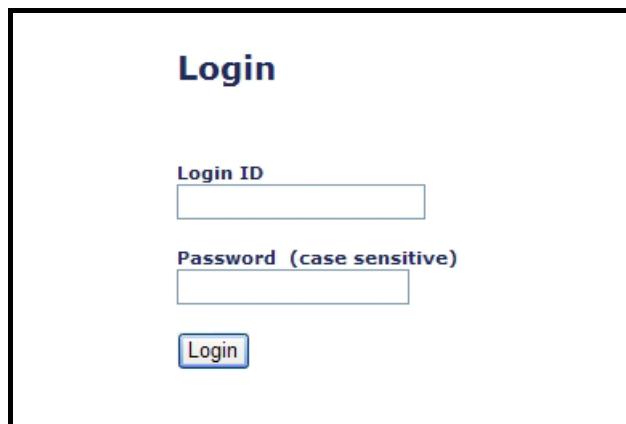
8.3. Login

The login page is the first page that appears when the program is started.

1. Enter your Login ID and password into their respective fields (the **Password** field is case sensitive).

Users created by the installation are “user” with a password of “pass” for basic user access to the program, and “administrator” with a password of “pass” that has full control of the Site Manager system. It is strongly recommended that you rename these users and change the passwords as soon as the program is installed and running. It is also highly recommended that each user have his/her own login. For more information, go to User Manager and Group Manager sections of the Site Manager online help.

2. Press the **Login** button or press Return on your keyboard.



The image shows the Site Manager login interface. It features a title 'Login' at the top. Below it are two input fields: 'Login ID' and 'Password (case sensitive)'. Each field has a corresponding text input box. At the bottom is a blue 'Login' button.

Figure 8-1 - Site Manager Login

3. Click the **I Agree** button to begin using the application. (First-time users will be presented with the license agreement window.)
4. Once your login has been validated, the home page will open where the navigation tree and main information window are located.

8.4. Licensing

Site Manager has basic (*Maintenance Upgrades & Tech Support* license) and extra features that are activated by obtaining a license (some of which will need to be renewed yearly) and includes features such as user info, pending activities, activity history, setup, obtaining controller info, adding, editing, and deleting directories, sites, and control systems, and some administrator functions.

For features such as backing up, sending reports, forwarding and viewing advisories, setpoint broadcast, accessing the online help system, firmware transfer, and more, a Site Manager license is needed for activation. Additional plug-in features will need specified keys for operation.

The license key must be entered on the Feature Licensing page to activate the desired feature. A *Maintenance Upgrades & Tech Support* license key activates basic features and the feature license key activates feature functionalities of Site Manager.

The licensing activation page is accessible from the **Feature Activation** menu on the online help drop-down menu in Site Manager. The menu will only be visible with certain user privileges enabled to allow you to add/edit software license keys.

1. Locate your unique Hardware Fingerprint number on the Feature Licensing page.

2. Call Retail Solutions Customer Service at 770-425-2724 with the Hardware Fingerprint to obtain a license key for the desired features you wish to activate.
3. Click the **Add Feature** button on the Licensing page and enter the key into the boxes provided.
4. Click **Save**.

The key entered will know what feature it is associated with and will populate the appropriate field(s) on the screen. To override an existing key, a new key will need to be added and replace the existing key.

Click **Cancel** to stop and exit.

8.4.1. Maintenance Upgrades & Tech Support Licensing

The basic features of Site Manager require a *Maintenance Upgrades & Tech Support* license key and will be entered when first starting the program. As the one-year renewal period approaches, a reminder window will appear and prompt you to renew the *Maintenance Upgrades & Tech Support* key. Contact Retail Solutions Customer Service for renewal 770-425-2724.

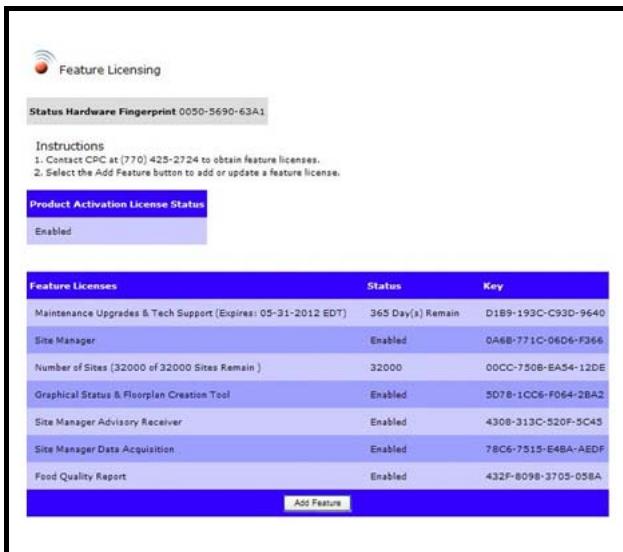


Figure 8-2 - Site Manager Feature Licensing Page

For more information on Status definitions, see the **Feature Activation and Licensing** topic in the Site Manager online help.

8.4.2. Feature Licensing

All possible Site Manager features will be displayed on the Site Manager Feature Activation screen.

8.5. Create A Directory Structure

8.5.1. Add A Directory

Directory structures include a directory, a site, and a control system. Units will automatically be populated once the control system has been added. To begin using the program by setting up a directory structure:

1. Right-click **Site Directories** in the navigation tree and click **Add Directory**, or open the Admin Tools drop-down menu.
2. Click **Setup > Directory Manager**.
3. Click the **Add New** button. The Directory Configuration page opens.
4. Enter the directory information into the fields and click **Save**. Your directory should now appear in the navigation tree where you can begin adding sites and other view levels.

Figure 8-3 - Directory Configuration Page

Once a directory is created, sites and control systems can be added and will become visible on the tree. These different levels or “nodes” make up the navigation tree structure.

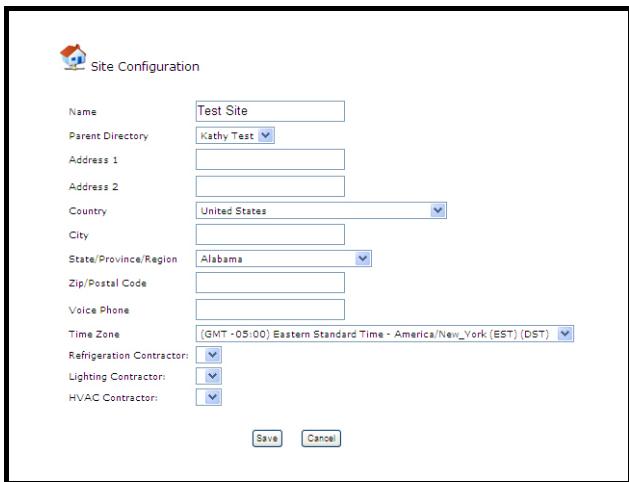
8.5.2. Add A Site

To add a site from the navigation tree:

1. Right-click the directory you wish to add the site to.
2. Click **Add Site**. The Site Configuration page opens.
3. Enter the site information into the fields and click **Save**. The site you just added appears in the naviga-

You can also access this menu from the **Site Manager** menu located under the Admin Tools drop-down list (click **Add New**) from the Site Manager page.

tion tree where you can continue to add sites and other view levels if desired.



The Site Configuration page allows you to enter details for a new site. Fields include: Name (Test Site), Parent Directory (Kathy Test), Address 1, Address 2, Country (United States), City, State/Province/Region (Alabama), Zip/Postal Code, Voice Phone, Time Zone (GMT -05:00 Eastern Standard Time - America/New_York (EST) (DST)), Refrigeration Contractor, Lighting Contractor, and HVAC Contractor. Buttons for Save and Cancel are at the bottom.

Figure 8-4 - Site Configuration Page

Click **Cancel** to stop and exit the page.



NOTE: Click the Refresh button  at the top of the navigation window to see any new levels that have been added. The Windows

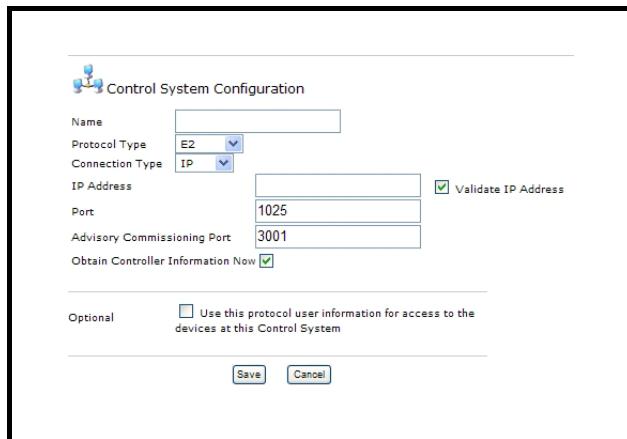
Refresh button on the browser will log you off. 

8.5.3. Add A Control System

To add a Control System from the navigation tree:

1. Right-click the site you wish to add the control system to (a control system is a descendant level of a site).
2. Click **Add Control System**. The Control System Configuration page opens.
3. Enter the control system information (**Name**, **IP Address**) into the fields and click **Save**. The new

control system is visible in the navigation tree. Continue to add other view levels if desired.



The Control System Configuration page allows you to enter details for a new control system. Fields include: Name, Protocol Type (E2), Connection Type (IP), IP Address, Port (1025), Advisory Commissioning Port (3001), and a checkbox for Validate IP Address. Under the **Optional** section, there is a checkbox for Use this protocol user information for access to the devices at this Control System. Buttons for Save and Cancel are at the bottom.

Figure 8-5 - Control System Configuration Page

8.5.3.1. Security Settings

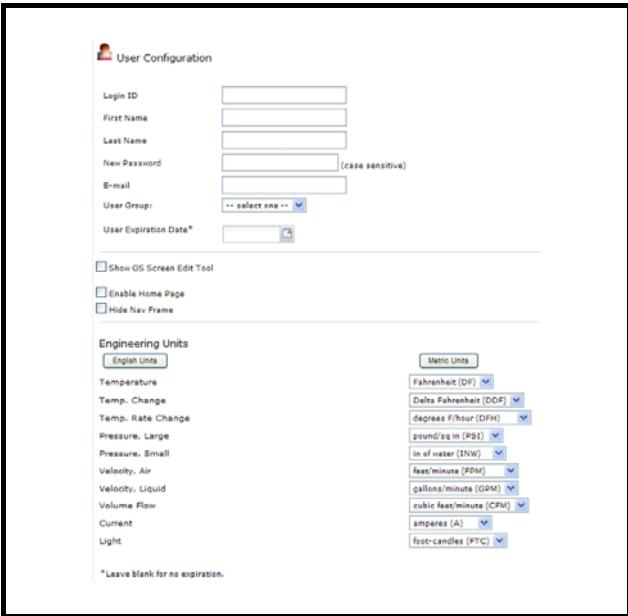
Security settings for Site Manager are defaulted at the group configuration level normally. Under the **Optional** section on the Control System Configuration page: If the protocol checkbox is enabled here (at the control system level), Site Manager will use the protocol information entered at the control system level and *bypass* the information at the group level for only the units located under this control system.

8.6. Set Up Users (Optional)

It is recommended that a directory structure be set up first, but users with administrator privileges can set up users and passwords:

1. Open the Admin Tools drop-down menu.
2. Click **Setup > User Manager**.
3. Click the **Add New** button. The User Configuration page opens.

4. Enter the user information into the fields and click **Save**. A user has been created and is saved to the database.



The screenshot shows the 'User Configuration' page. It includes fields for Login ID, First Name, Last Name, New Password (case sensitive), Email, User Group (a dropdown menu), and User Expiration Date (a date input field). Below these are checkboxes for 'Show GS Screen Edit Tool', 'Enable Home Page', and 'Hide Nav Frame'. A 'Engineering Units' section is present, with 'English Units' selected. It lists various unit options for Temperature, Temp. Change, Pressure, Velocity, and Current, with Fahrenheit selected for Temperature. A 'Metric Units' section is also visible. At the bottom, a note says '*Leave blank for no expiration.'

Figure 8-6 - User Configuration Page



What Else Can You Do On The User Configuration Page? Set the Engineering Units default, activate GS Screen menus, and enable GS Screens to be set as your home page.

You have now successfully created a navigational tree structure where you can continue adding directories, sites, and other view levels.

Appendix A: Java Installation



NOTE: Refer to Appendix C: Supported Product Versions for supported product versions.

If you are installing Java Runtime, the following windows will appear. If you need the Apache Tomcat installation, go to **Appendix B: Apache Tomcat Installation**.

1. The license agreement window will open:

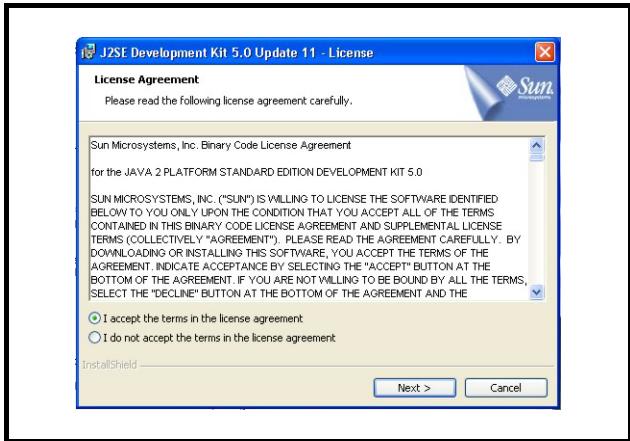


Figure A-1 - Java License Agreement

- a. The Java 2 SDK License Agreement window will open. I accept the terms in the license agreement must be selected to continue with the install and open the Custom Setup window:

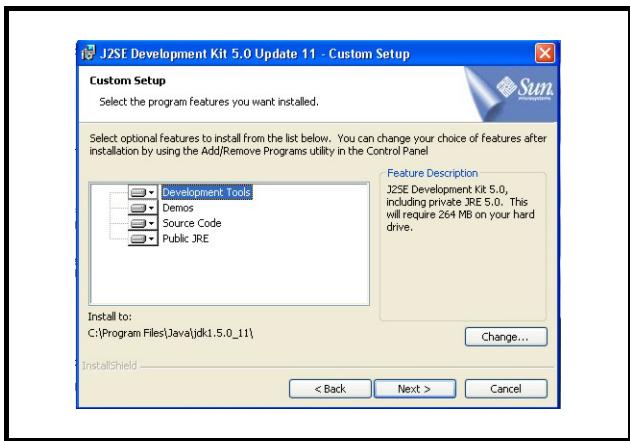


Figure A-2 - Select Program Features to Install

2. The *Custom Setup* window gives you the option to only install what features are needed.
 - a. **Development Tools and Public Java Runtime**

Environment are the only two that need to be selected.

- b. If you wish to deselect an option, click the down arrow in the icon next to the item and select **don't install this feature now**.
- c. Click **Next** and the development components will be installed.
3. The next *Custom Setup* window displays program features to install. Click **Next** to install these default features and proceed to the *Browser Registration* window.

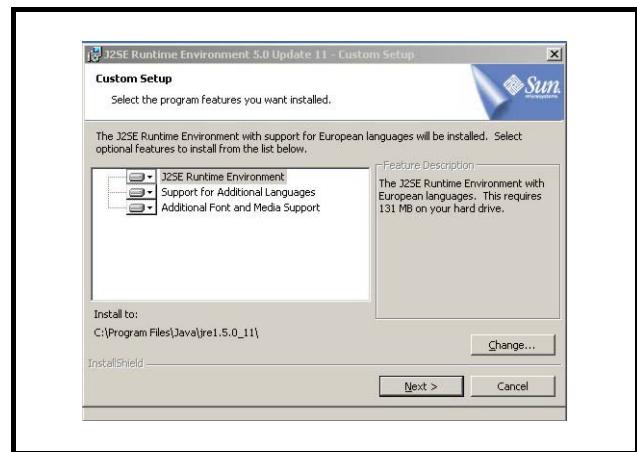


Figure A-3 - Default Program Features to Install

4. The *Browser Registration* window will open:

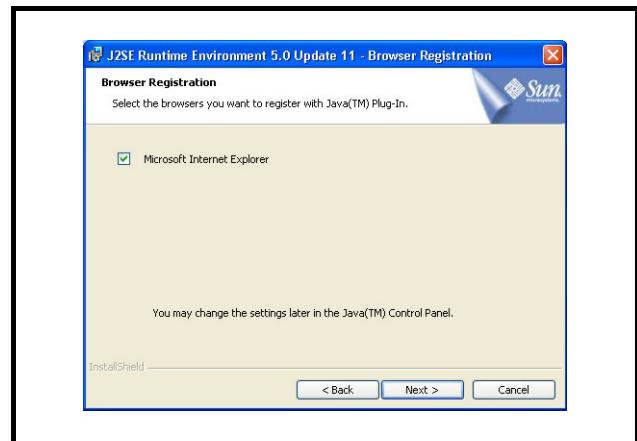


Figure A-4 - Browser Registration

- a. Click **Next** to continue and start the installation.



NOTE: If you have questions about the install, contact www.java.sun.com.

5. A progress window will appear showing the progress of the Java installation:

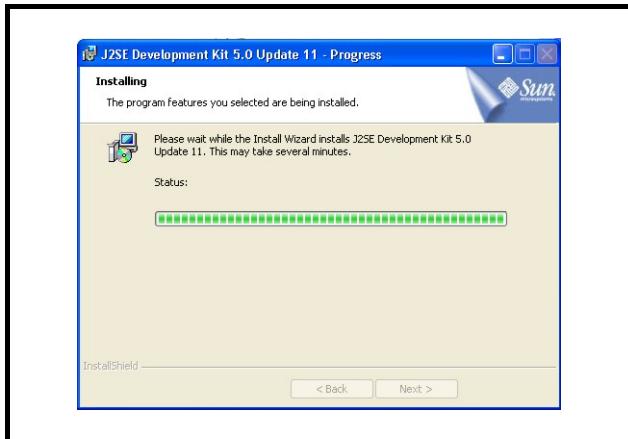


Figure A-5 - Java Install Progress Window

6. When the installation of the Java is complete, the *Java 2 SDK InstallShield Wizard Completed* window opens:



Figure A-6 - Java Install Complete Window

- a. Click **Finish**.

Appendix B: Apache Tomcat Installation

- a. Click the **I agree** button to continue:

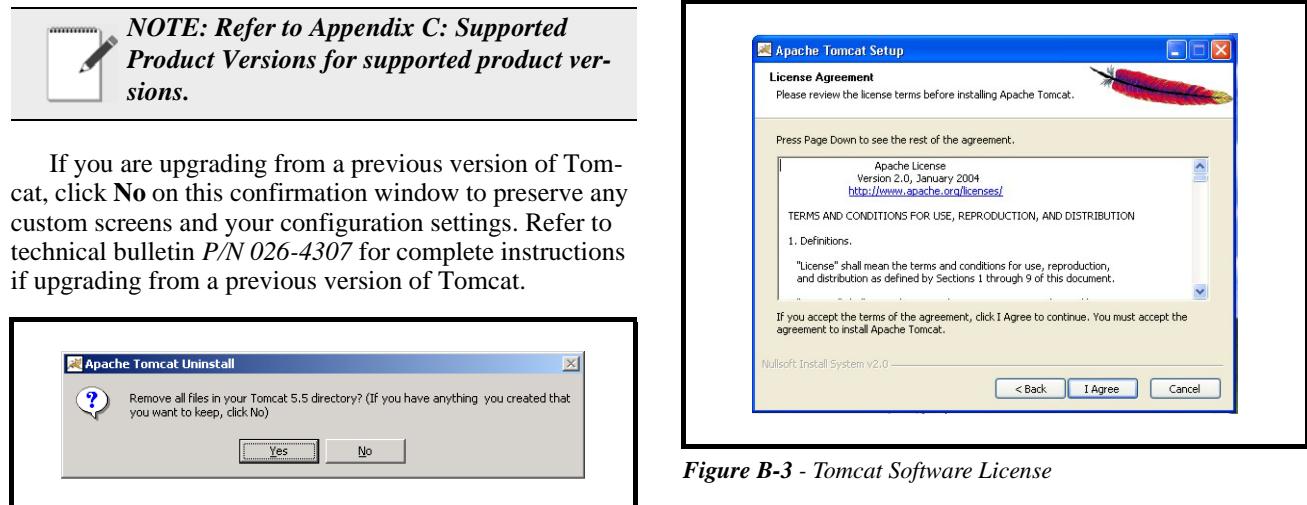


Figure B-1 - Click **No** To Save Your Configuration Settings

1. If you are installing Tomcat, click **Next** on the first window of the Setup Wizard:



Figure B-2 - Install Tomcat

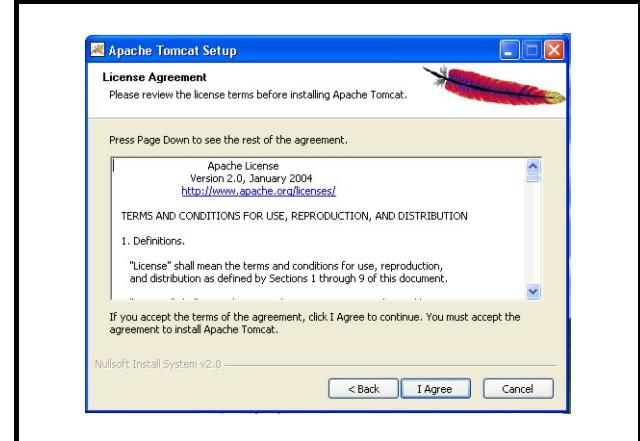


Figure B-3 - Tomcat Software License

2. The *Tomcat Installation Options* window will open:

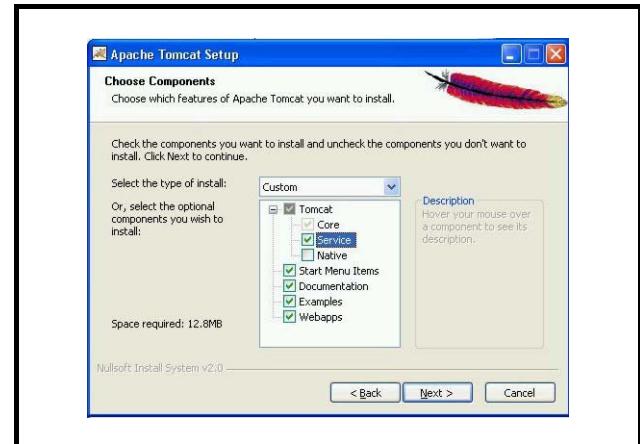


Figure B-4 - Select Components to Install

- a. Check **Tomcat, Service, Start Menu Items, Documentation, Examples, and Webapps**. It is strongly recommended that **Service** be checked. If the **Service** component is not selected, you will have to manually start the Web service each time the server is rebooted.
- b. Click **Next** to proceed and select the directory where you would like Tomcat to be installed.
3. Choose the default location or click **Browse** to choose a custom location from the *Tomcat Installation Options* window.

tion Options window:

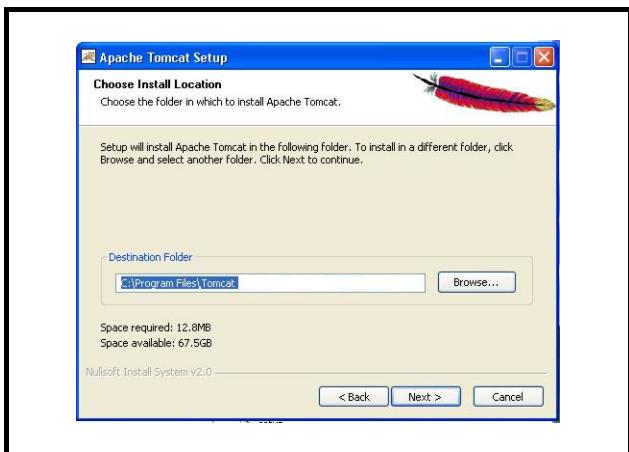


Figure B-5 - Tomcat Install Location

 **NOTE: To avoid a change in Site Manager's location each time Tomcat is upgraded, it is suggested that a generic, non-version specific location for the install be chosen. For example, C:\Program Files\Tomcat.**

- a. When you have selected the location, click **Next** to proceed to a configuration options window:

4. The *Configuration Options* window opens:

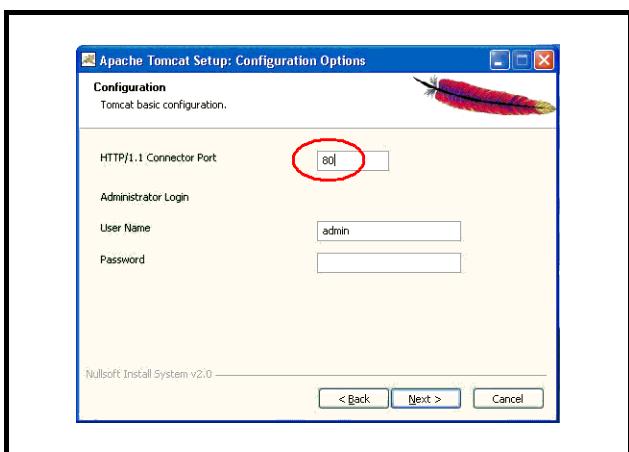


Figure B-6 - Change Connector Port to 80

- a. It is *strongly recommended* that for normal use the connector port be changed to **80**.
- b. Click **Next** to continue.

5. Select the path for the Java Virtual Machine and

click **Install**:

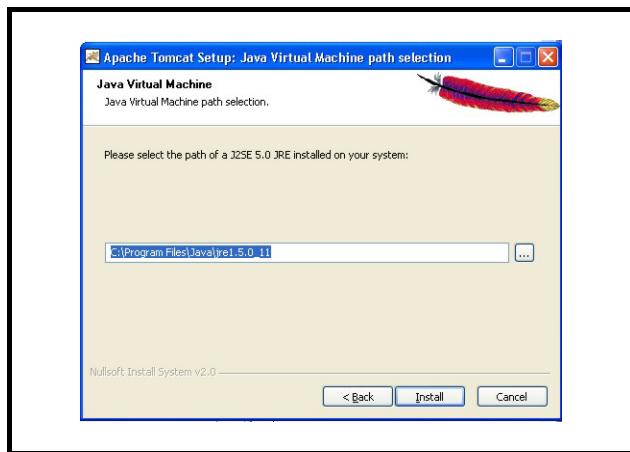


Figure B-7 - Select the Java Virtual Machine Path

This default location should be correct, but verify the path and change if needed.

6. The *Tomcat Setup* progress window will open:

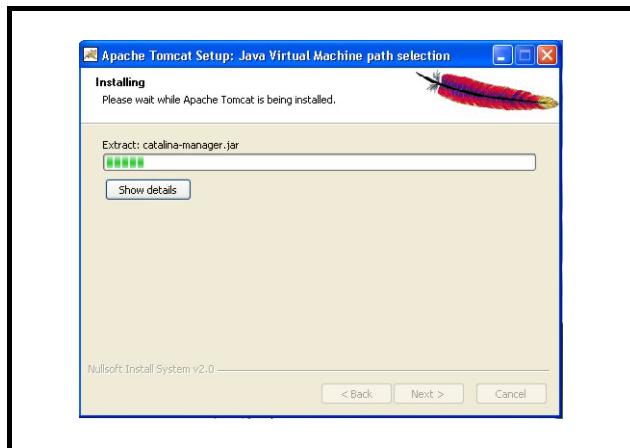


Figure B-8 - Tomcat Setup Progress

- a. Complete the Wizard Setup:

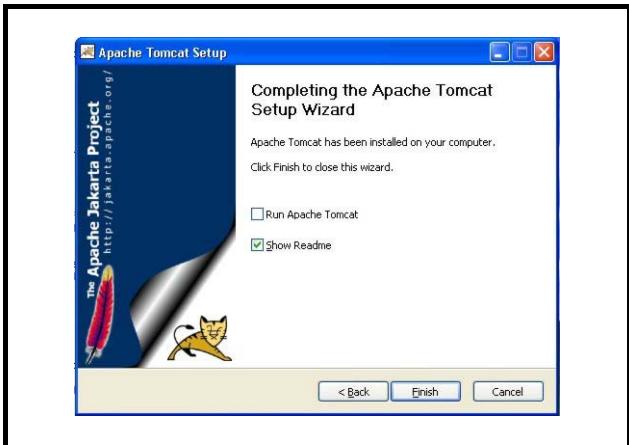


Figure B-9 - Click Finish To Complete Tomcat Setup

- b. Verify the **Run Apache Tomcat** checkbox is unchecked, and click **Finish** to close the *Tomcat Setup* window and complete the setup.

Appendix C: Supported Product Versions

The following products used by Site Manager are only supported for the specified versions. Installing products with different versions are not supported.

Product Name	Supported Version
Java	1.5.0_11
Tomcat	5.5.26
Microsoft Windows Server	Windows Server 2003 SP2 - Standard Edition, Standard x64 Edition, Enterprise Edition
SQL Server	SQL Server 2005 SP1 - SP4

The contents of this publication are presented for informational purposes only and they are not to be construed as warranties or guarantees, express or implied, regarding the products or services described herein or their use or applicability. Emerson Retail Services, Inc. reserves the right to modify the designs or specifications of such products at any time without notice. Emerson Retail Services, Inc. does not assume responsibility for the selection, use or maintenance of any product. Responsibility for proper selection, use and maintenance of any Emerson Retail Services, Inc. product remains solely with the purchaser and end-user.

026-1010 06-OCT-2011 Emerson is a trademark of Emerson Electric Co. ©2011 Emerson Retail Services, Inc. All rights reserved. Printed in the USA.

